Enhancement Number	Date Logged	Enhancement Author	Enhancement Description	Affected Report(s)	Priority (H,M,L)	Status	Resolution By	Resolution Date	Enhancement Resoultion	
1	5/22/2001	Haenel-Beck	Modify the Loan Consolidation Rebate Fees report to go by region and only show the lenders that actually have rebate fees	Loan Consolidation Rebate Fees	M	Closed	Annie	5/25/2001	Added an initial prompt to solicit a region. The next prompt screen only shows lenders in the selected regions that actually have consolidation rebate fees.	
2	6/6/2001	Sullivan	Need to revise the way that the values are determined for the Lender Scorecard. In addition, reports will be required that show the build up of the summary information that is on the scorecard	Lender Scorecard and other new reports	M	Open				
3	5/30/2001	Haenel-Beck, Roca-Baker, and others	It would be nice to have reports that were not based upon a given GA id or Lender id. Need to have reports that are structured to help find some overall problems. For example, 799 Part II - show all lenders that have a loan type of 'TG' so that we can compare with the loan consolidation information.	Need to determine which reports need to be accessed by other than a lender id or GA id	M	Open			This will need to be done on a report by report basis. The existing reports do not need to change. The users are requesting new reports that will allow something other than searching by lender or GA ids.	
4	5/24/2001	Sullivan	Part II, Part III, and Part IV Lender Search Reports are identical (except for one calculated column that is no longer used) to the reports that are available in the Lender 799 Forms folder. Therefore, they can be deleted. The one remaining report (Lender Search Report Summary) can be moved into the Lender 799 Forms folder.	Part II, Part III, and Part IV Lender Search Reports	L	Open			Nettie to follow up with the workgroup as to what fields they want on which reports, the order of the fields and the total lines that need to be included.	
5	6/5/2001	Harding	For reports that show a year/qtr, show the ending month of the quarter instead of the FQ# or CQ# (this is related to Enhancement #9)	All	M	Open				
6	5/22/2001	Harding/ Senseney	We would like to make changes to the way that the Top 100 Loan Holders report is created. We will need to discuss the requirements in further detail. Collect history for Lender Associations and create this report 'As Of' a certain date ensuring that both the Lender reported valUes and the associations are 'As Of' a particular date. Only include those lenders if the associated lender has a balance > 0. Use the parent LID name, city, and state.	Top 100 Loan Holders	M	Open				
7	5/22/2001	Haenel-Beck	Parse the Document ID field and make it easy to read. For example, create another column that has 'Rebate Fee' instead of the 'RF' in the middle of the Document ID field.	Consolidation Loan Rebate Fees	L	Open				
8	6/6/2001	Sullivan	There are times when the entire 799 report (and possibly the Lender Search report) needs to be viewed (and possibly printed). It would be nice if this could occur as a single document instead of having to view/print several individual reports. This needs to be further researched. With the current structure of the reports with information in the 'page by' area, this might mean that the 'full report' does not display as expected.	799 reports and lender search reports	M	Open				
9	6/6/2001	Harding	The prompts which request dates usually ask for a fiscal quarter. This can be confusing for users and the GAs and Lenders. A possible recommendation is to show the ending month for the quarter instead of using FQ1, 2, 3, 4. This might avoid the confusion.	1130-part A and both part C; FN/LN Principal Comparison, Lender 799 G/L Comparison, Lender changes in loan principal, multi-year portfolio analysis, part II/part V disbursement comparison by loan type, part III/part VI comparison, Lender 799 reports - all, Lender search reports - all	M	Open				
10	6/6/2001	Sullivan	For some of the reports, it would be nice to see the 'A-1', 'A-2', etc so that the information may be more specifically tied back to the original form	1130 and 1189 reports	L	Open				

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11	6/7/2001	Chiu/Duffin	For 1189 parts, the selection criteria needs to be entered 9 times to get the 'full report'. There should be a way to view the complete report without haviing the enter the selection/prompt information multiple times	1189 reports	L	Open				
12	6/8/2001	Harding	Need an 'all' report. For a selected year, a report is needed that will show annual information on all guarantors	New report (based upon Annual Report: Financial Funds Stmt and Sources/Uses of Funds, Pending and Contingent Transactions)	H	Open				
13	6/8/2001	Senseney	Need the 3 data book reports by loan type	new reports (based upon Collections on Default Loans for all FFEL Loan Types, Default Dollars Paid to Lenders for all loan types, and Loan volume commitment for all FFEL loan types)	M	Open				
14	6/8/2001	Harding	Add a 'Reserve Fund Balance (Cash)' line	Sources/Uses of Funds, Pending and Contingent Transactions	M	Open				
15	6/7/2001	Chiu/Duffin	Add the 1189/1130 form line number to the reports	1130 and 1189 reports	L	Open				
16	6/8/2001	Harding	Collapse the columns to have only one column on the reports	Annual Report: Financial Funds Stmt, Sources/Uses of Funds, Pending and Contingent Trans	L	Open				
17	6/5/2001	Harding	Part IV of the 799 report and Part IV of the Lender search report show an applied quarter year of the Fiscal quarter/year not the calendar quarter/year as in the current report. SFA needs to determine which quarter/year they want to use for the reports. The GA reports and the Lender reports might want to use different approaches.	799- Part IV and Lender Search Report Part IV (may not need the lender search report based upon enhancement # 4)	M	Open				
18	6/14/2001	Wallace	Need a new report to add the information currently available on X200 Inquiry Sheet – Tracking File. This report shows all transactions related to an ED form 799 by LID and quarter	new report	L	Open				
19	6/14/2001	Wallace	A report like the Leading Lenders Report (GLINT825). This report would give the Ending Principal Balance and loan originations during the fiscal year. It would be better if the balances and loan originations were reported by loan type as well.	new report	L	Open				
20	6/14/2001	Wallace	A report that would compare all lenders that reported consolidated loans (loan type TC) on the ED form 799 with lenders that paid consolidation loan rebate fees for the same time period	new report	H	Open				
21	6/14/2001	Wallace	A report that would provide annual totals by LID from Part II of the ED form 799 for Code FS (Fee on loans made and sold) and FB (loans bought if the purchasing lender owed the origination fees)	new report	M	Open				
22	6/14/2001	Wallace	A report showing lenders with all loans reported as sold on ED form 799 during a year (GLINT833)	new report	L	Open				
23	6/14/2001	Wallace	A report showing Voids, cures, claims filed, and claims paid information (cumulative for fiscal years). On the same report show end of year totals for ending principal balance and totals for borrowers in repayment.	new report	M	Open				